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## ABSTRACT

Few standards for reference services have appeared in the past, therefore guidelines for reference librarians at the University of Michigan--Dearborn library are offered. The guidelines presented are based upon reference standards prepared by the Reference and Adult Services Division (RASD) Standards Committee for the ALA Centennial Conference in Chicago. Included in the guidelines are a library reference policy statement, priorities, and general guidelines for reference desk duty. (AP)

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Standards for Reference Service at the University of Michigan-Dearborn Library

by Sara Galligan

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# Standards for Reference Service at the University of Michigan-Dearborn Library

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## Introduction

The challenge of formulating reference service standards exists in the minds of many librarians who have followed the progress of the RASD Standards Committee over the years. However, it appears that few librarians have attempted to develop reference service guidelines for their libraries. Perhaps librarians take for granted the term "reference service" and prefer to devote attention to matters more serious or clearcut than the formulation of reference service guidelines. While developing the following statement, I worked closely with the other reference librarians at the UM-Dearborn Library and found that we not always agreed on the interpretation of "reference service." Nevertheless, I was able to complete a statement that describes the practice of reference service at the UM-Dearborn Library and acts as a guideline for reference service for current staff, library interns, and new staff as well as any other interested party. Because the formulating of guidelines is a difficult task to complete, I hope that the availability of this document through ERIC will help other librarians in need of a model for developing their own reference guidelines.

Previous articles have appeared regarding the need for reference policy statements. Mary Jo Lynch describes this need in her article "Toward a Definition of Service: Academic Library Reference Policy Statements" (RQ, 11:22-6, Spring 1972). In her article she includes an outline used by librarians at the University of Massachusetts in the development of their guidelines for reference service. This outline also appears with the statement prepared by the RASD Standards Committee for the ALA Centennial Conference in Chicago. This statement, entitled "A Commitment to Information Services; Developmental Guidelines," is printed in Library Journal's April 15, 1976 issue. I found this statement very useful in developing reference service guidelines for the UM-Dearborn Library.

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## UM-D Library Reference Policy Statement

### I. Introduction

- A. Nature of Reference Services--See "A Commitment to Information Services: Developmental Guidelines" adopted by RASD, January 1976 (attached).
- B. The objective of this policy statement is to provide guidelines for reference service.
- C. Purpose--
  - 1. For consultation by experienced librarians needing clarification of policy.
  - 2. For new librarians and library interns needing to develop awareness of the practice of reference service at the UM-D Library.
  - 3. For any interested party, this is a presentation of a detailed framework of the reference service as performed at the UM-D Library.

### II. Types of Service

- A. The goal of service at the UM-D Library is to assist patrons in their information needs. The character and extent of the reference service will depend upon the nature of the inquiry but may range from finding a specific answer to providing instruction in the use of the library and its resources. At all times, transactions between the reference librarian and the patron will remain in strictest confidence. Because a secondary goal at this university library is to instruct users in reference search strategy, sources, and general library policy, the reference librarians should assist patrons in the development of skills for coping with future information needs with initiative and expertise. This instruction may occur as a library orientation function or during the reference transaction between the patron and librarian when the librarian may answer a specific request for information as well as instruct the patron in the use of the reference source. Librarians should judge the level of difficulty encountered by the patron in using reference material. When reference material is new or unfamiliar to the patron, the librarian should explain its usage. Items such as indexes, abstracts, and handbooks, etc., may require further explanation by the librarian to the extent that the librarian locates the information for the patron. However, items such as dictionaries and encyclopedias should be familiar to the patron. When librarians refer to such items, it may be assumed that the patron can find the information he/she needs.
- B. Reference Services Offered at the UM-D Library
  - 1. Librarians will provide information service on demand for patrons and for telephone inquiries. In general, librarians are available during the school year from 8 AM to 9:30 PM, Monday through Thursday, 8 AM to 5 PM on Friday, and on Sunday from 1:30 to 8 PM. Librarians

maintain shorter hours during Spring, Summer, vacation and holiday times.

2. Reference librarians will provide tours or individual instruction in search strategy for patrons.
  3. Referrals will be made to outside sources, including UM-Ann Arbor, other local libraries, newspapers, and agencies.
  4. Librarians will assist in bibliographic verification for patrons as well as assist the interloan and intraloean function.
  5. Librarians will respond to requests for materials not owned by the library or for new materials to replace outmoded items. Requested materials may be ordered if judged to be of good quality by the librarian. See also Bibliographic Services.
- C. It is not the policy of the library to vouch for the accuracy of a particular answer or source, although the librarians should be prepared to give some indication of its reliability.

### III. Library Users

- A. Reference Services are provided for any individual regardless of affiliation with the University.
- B. UM students, faculty, and staff and guest card holders may check out books from the general collection. Only in special cases are reference materials allowed to circulate. (See Section V. F)
- C. Any person from the outside community may use materials in the library.

### IV. Priorities

- A. At all times, coverage of the Reference Desk must be considered the first priority responsibility of the reference librarians.

### V. Reference Desk Service Policies and Instructions

#### A. General Guidelines for Desk Duty

1. Reference librarians are scheduled for duty at the reference desk a certain number of hours each week. An attempt will be made to provide backup coverage during heavy demand times.
  2. All telephone and in-person inquiries will receive the attention of the On Duty reference librarian.
    - a. Non-problem inquiries should be handled promptly and completely.
    - b. Librarians may elect to continue or postpone a problem inquiry over a longer period of time and ask a patron to return to the library for his/her information.
  3. Reference librarians should at all times be approachable and responsive.
  4. Librarians will maintain a card file of difficult-to-find and frequently sought requests.
- B. During times when library interns are on duty as reference librarians, reliable backup coverage should be assured. Interns are responsible for providing the same services as librarians (except for issuing guest cards and ordering books) and should feel free to ask for assistance from professional librarians at any time.

### C. Telephone Inquiries

#### 1. Incoming Calls

- a. Librarians are committed to answering reference calls via telephone as they are received. The librarian should make a judgment regarding length of time needed to answer the question. If the question will involve a lot of time, the librarian should take the caller's phone number and return the call at the earliest convenient time.
- b. Responses to telephone inquiries may include: providing brief reference information; checking the public catalog or periodicals notebook; checking circulation files or shelves for requested materials; holding materials at the CJAC Desk for UM students, faculty and staff; and providing general library information.

#### 2. Outgoing Calls

- a. Reference librarians should return patron calls when a long period of time is required to respond to an inquiry.
- b. The reference desk phone may be used by faculty, students, and staff for incoming calls only.
- c. Personal calls should not be made at the reference desk phone.
- d. Reference librarians will use the reference desk phone to request services and information from UM-Ann Arbor. This service should also be performed on behalf of students, faculty, and staff if their inquiries pertain to library information.
- e. Emergency calls can be made at any time at the reference desk phone.

### D. Card Catalog Service

1. When it is obvious that a patron is unfamiliar with the card catalog, the reference librarian should provide guidance in its use. The user may need help in determining an appropriate subject heading. In this case, LC Subject Headings should be introduced.

### E. Temporarily Unavailable Sources

1. Librarians will respond to inquiries for materials "In Process" and attempt to provide these for the patron.
2. Periodicals in "gathering" status may also be retrieved for the patron. These materials must be returned to the librarian when the patron is finished using them. If a periodical is at the bindery, every attempt should be made by the librarian to refer the patron to an outside location of the periodical or to encourage intralibrary loan from Ann Arbor.
3. Bindery materials are temporarily unavailable. The librarian should advise the patron as to the next arrival of bindery materials.
4. Librarians will file a search request when materials appear to be lost.

### F. Circulation Policies for Reference Materials

1. Reference books circulate under limited circumstances on an hourly or daily basis.
  - a. Students may take reference materials for class demonstrations.
  - b. Faculty members may sign out materials for use outside the library.
2. The Pamphlet materials circulate for one week.
3. Microforms do not circulate.
4. Unprocessed materials may not circulate.
5. Problems in the shelving of materials should be reported to the Circulation Desk.

### G. Statistics

1. Reference librarians will record statistics for transactions involving patrons, faculty, and telephone. Directional questions and tours should also be recorded. Directional vs. Reference Transactions will be defined per ~~DHEW~~ Higher Education General Information Survey and Library and General Information Survey (LIBGIS).

#### H. Responsibilities on Nights and Weekends

1. Reference librarians shall assume the responsibility of chief supervisor of all library personnel (clerical and student assistant) during evening hours and weekends.
2. Reference librarians shall make emergency decisions during weekend and evening hours. A policy statement entitled "Library Closing Conditions" is available in the reference desk for consultation during emergency situations.

#### VI. Interlibrary Loan Services

- A. Reference librarians will provide assistance to the Circulation Desk staff on the verification of inter- and intra-loan through the use of union lists and book catalogs of other libraries.

#### VII. Bibliographic Services

- A. Librarians will assist patrons in the use of bibliographic materials such as indexes, abstracts, card catalog, and other systematic lists.
- B. Librarians will consider and produce useful bibliographic guides.
- C. Reference librarians will initiate searches for faculty members requesting computer literature searches via SDC and LOCKHEED. The final computer search will occur in UM-Ann Arbor.
- D. On a limited basis, the librarians will perform SDI (Selective Dissemination of Information) services for faculty members.

#### VIII. Reference Correspondence

- A. Incoming requests should be routed to the reference librarian most familiar with the nature of the inquiry.
- B. The reference librarian should prepare a reply to the inquiry and send it out in a reasonable period of time.

#### IX. Reference Collection

- A. The Head of the Reference Department will be responsible for the selection of materials to support reference service to UM students, faculty, and staff.
- B. The Head will also be responsible for maintaining and weeding the reference collection.
- C. All reference librarians should be aware of new reference materials in all areas and feel free to advise the Head on new acquisitions.
- D. All reference librarians should note outmoded reference books when they come in contact with them. Report outmoded titles to the Head of Reference.
- E. Reference books containing information of special or urgent interest (Summer Study Abroad, Lasser's Tax Guides) will be placed on display as deemed necessary by the reference librarians.

#### X. Professional Librarian Development

- A. Reference librarians are expected to continue their professional development in the art of reference work, new materials, and librarianship in general through professional reading, classes, and workshops.